Datex
FootPrint WMS
Silverlight ePortal User Manual

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Silverlight ePortal

The FootPrint Silverlight ePortal provides basic access to information about your Warehouse, as well as an interface for submitting Orders. Primarily intended for use by customers, the ePortal is accessible from anywhere with internet access.

Silverlight ePortal

ePortal User System Requirements

Sections

- [General Requirements](#)

Before users are able to access FootPrint ePortal, they will need to make sure their systems meet the following requirements.

General Requirements

- FootPrint ePortal functions using **Microsoft Silverlight**. In order to access the ePortal, users will need to have the Silverlight Plugin installed in their web browser.
- Ensure the time between the local machine and ePortal server isn't offset by more than **5 minutes**. If it is, the user authentication will fail.
- Ensure users are allowed to access the following ports of the ePortal site:
  - 443
  - 8879

Supported Browsers

The following browsers support Microsoft Silverlight.

Microsoft Windows

- Internet Explorer 7 or later
- Mozilla Firefox 3 or later

Mac OS X

- Safari
- Mozilla Firefox 3 or later

ePortal New Order

Sections

- Overview
- Main Screen Layout
- Order Header
- Order Lines

Overview

The ePortal New Order tab allows the user to create a new Order, using the existing information in FootPrint. This screen serves a similar function to both the Create Inbound Order and Create Outbound Order sections.

Main Screen Layout

The New Order tab is divided into two parts:

1. Order Header

Allows the user to enter basic Order information, and includes a Save button to submit the Order.

2. Order Lines

Allows the user to specify which items will be included in the Order.

Order Header

Here the user enters specific information about the Order they are creating, referencing existing information in FootPrint, or adding new information to the system.

Order Header Information

Order Number.:	The LookUp number associated with the Order. The system will generate one, but the user can overwrite it.
Order Class:	The user must select an Order Class from a drop-down list. The chosen Order Class will determine whether this is an Inbound or Outbound Order.
Owner:	A drop-down list of all the Owners available to the user.
Project:	A drop-down list of all the Projects available to the user.
Carrier:	A drop-down list of all the Carriers available to the user.
Service Type:	A drop-down list of all the Service Types available to the chosen Carrier.
Status:	The Status of your Order. This is a system-generated field.
Account:	The Name of the Account to be associated with this Order. The user can select an existing Account by opening the Select Account pop-up window, or create a new Account.
Contact:	The Contact for the Account to be associated with this Order. The user can select an existing Contact by opening the Select Contact pop-up window, or create a new Contact.
Address Line 1:	The Contact's address.
Address Line 2:	The Contact's address continued.
City:	The Contact's city.
State:	The Contact's state.
Country:	The Contact's country.
Postal Code:	The Contact's zip or postal code.

Owner Reference:	An open field for Owner related Reference information.
Vendor Reference:	An open field for Vendor related Reference information.
Order Notes:	An open field for notes or extra information.
Last Modified On:	A system-generated field, indicating when this Order was last edited.
Last Modified By:	A system-generated field, indicating who last edited this Order.
Expected Date:	The Expected Date of the Order's shipment, arrival, or completion.

*Those in red are required fields.

The **Save** button submits the Order, creating a new Order of the specified Order Class in FootPrint.

Accounts and Contacts can be selected using the **"…"** button, or created using the **"+"** button.

Select Account Pop-Up Windows

The **Account Name**, **Account Lookup Code**, and **Account Type** fields can be used to filter the displayed Accounts.

LookUp Code:	The LookUp Code for the Account.
Name:	The Name of the Account.

Account Type: The Type of Account.
Notes: Any Notes in the system for the Account.

Create Account Pop-Up Windows

The **Account Name**, **Account Lookup Code**, and **Account Type** fields can be used to filter the displayed Accounts.
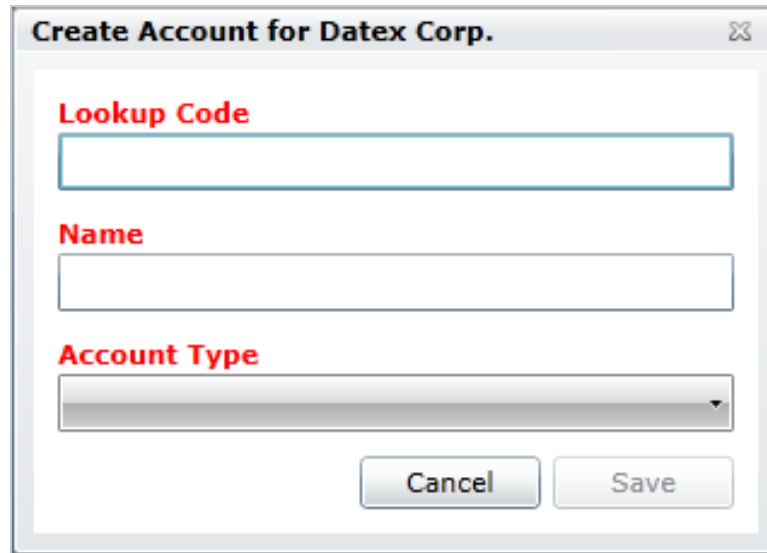
LookUp Code: The LookUp Code for the Account.
Name: The Name of the Account.
Account Type: The Type of Account.
Notes: Any Notes in the system for the Account.

*Those in red are required fields.

Select Contact Pop-Up Windows

The **Lookup Code**, **Last Name**, and **First Name** fields can be used to filter the displayed Contacts.

LookUp Code: The LookUp Code for the Contact.

Last Name: The Contact's Last Name.

First Name: The First Name of the Contact.

Attention: The Attention Line for the Contact.

Line 1:   The first Address Line for the Contact.

Line 2:   The second Address Line for the Contact.

City: The Contact's City.

State: The Contact's State.

Postal Code: The Contact's ZIP or postal code.

Country: The Contact's Country.

Create Contact Pop-Up Windows

Create Contact for Wal-Mart 6404

Lookup Code

First Name   **Last Name**

Attention Of

Line 1

Line 2

City

State   **Postal Code**   **Country**

Cancel   Save

LookUp Code: A LookUp Code for the Contact, for your own Reference.
First Name: The Contact's First Name.
Last Name: The Contact's Last Name.
Attention: The Attention Line for the Contact.
Line 1:   The first Address Line for the Contact.
Line 2:   The second Address Line for the Contact.
City: The Contact's City.
State: The Contact's State.
Postal Code: The Contact's ZIP Code.
Country: The Contact's Country.

*Those in red are required fields.

Order Lines

Here the user specifies the items to be included in the Order they are creating, referencing existing Material information in FootPrint.

Order Information

	Line	Material	Material Name	Packaging
	0			
▶	1	Material 1		Case
▶	2	Material 3		Pallet

Line: The Order Line number for the Line - system generated.

Material: Specifies the Material Lot for the Order Line. Select from a drop-down list, or click the magnifying glass icon to search for Materials (you can also create a new Material this way).

Material Name: The Name of the chosen Material for the Order Line - system generated.

Packaging: Select the Packaging Type that the Quantity refers to.

Quantity	Available	Remaining	Status	Vendo	Lot	Shipm	Notes
15.00	1,674.00	1,659.00					
1.00	23.00	22.00					

Quantity: Enter the Quantity of the Material for the Order Line.

Available: How many of the selected Packaging of this Material are available.

Remaining: How many of the selected Packaging of this Material will be available after the Order is fulfilled.

Status: The Status of the Order Line (Created, Completed, etc) - system generated.

Vendor Lot: Specifies the Vendor Lot for the Order Line.

Lot: Specifies the Material Lot for the Order Line.

Shipment: The Shipment this Order Line is on - system generated.

Notes: An open field for notes or extra information.

*Those in red are required fields.

Create a New Order

This tutorial will walk you through the process of creating a new Order using the FootPrint Silverlight ePortal.

Step 1. Add a New Order

1. Click **New Order**.

Step 2. Fill Out the Order Header

1. Update **Order Number**.

2. Select **Order Class**.

3. Select **Owner**.

4. Select **Project**.

5. (Optional) Select **Carrier**.

6. (Optional) Select **Service Type**.

7. Associate an **Account**.

Existing Account

a. Click **...**

b. Click on the applicable line.

c. Click **Select Account**.

New Account

a. Click **Create**.

b. Enter **Lookup Code**.

c. Enter **Name**.

d. Select **Account Type** from the drop-down.

e. Click **Save**.

8. Associate a **Contact**.

Existing Contact

a. Select a **Contact** from the drop-down.

New Contact

a. Click **Create**.

b. Enter **Lookup Code**.

c. Enter **First Name** and **Last Name**.

d. Enter **Address Line 1**.

e. Enter **City**.

f. Enter **State**.

g. Enter the **Postal Code**.

h. Click **Save**.

9. (Optional) Enter **Owner Reference**.

10. (Optional) Enter **Vendor Reference**.

11. (Optional) Enter **Notes**.

Step 3. Enter the Order Lines

1. Click **Material** Field to activate the drop-down.

2. Select **Material** from the drop-down.

3. Select **Packaging** from the drop-down.

4. Enter the **Quantity**.

Step 4. Save the Order

1. Click **Save**.

ePortal Orders

Sections

- Overview
- Main Screen Layout
- Order Filter
- Order List
- Order Details

Overview

The ePortal Orders tab displays a list of all Orders in the system, which can be filtered by entering specific search terms. These Orders can be opened for more detailed information. The user is also able to upload Order requests through this tab.

Main Screen Layout

The Orders tab is divided into two parts:

1. Order Filter

Allows the user to search for Orders by the desired terms, and upload new Orders in the form of Excel Worksheets.

2. Order List

Displays information about all Orders in the system matching the search terms.

Order Filter

Here the user can enter specific information by which the Orders displayed in the Order List will be filtered, including drop-down lists for the **Owner** (the only information required to be entered) and **Project**, the dates between which the Orders were **Created**, and open fields for the **Order Number**, the **Owner Reference Number** (as entered in the Order Basic Information), and the **Vendor Reference Number** (entered in the Order Header tab). Once filter terms are entered, clicking the **Search Orders** button will display all relevant Orders in the Order List.

The **Upload Orders** button allows the user to upload an Excel Worksheet file (97-2003 .xls format) as an Order request, which will be saved to the **OrderImports** folder on the FootPrint server.

Order List

After searching for Orders, all Orders that match the filter terms will be displayed in the Order List, along with information about those Orders.

Order Information

Order #	Status	Order Class	Owner Name	Project Name
77	Completed	Sales Order	Gilgamesh Cooking	Low Quality Goods
79	Processing	Sales Order	Gilgamesh Cooking	Low Quality Goods
80	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods
81	Completed	Purchase Order	Gilgamesh Cooking	Low Quality Goods

Order #: The Order Number for the Order.

Status: The current Status of the Order.

Order Class: The Order Class the Order has been assigned to.

Owner Name: The Name of the Owner for whom the Order was created.

Project Name: The Name of the Project under which the Order was created.

Account Name	Created By	Created On	Warehouse
	DATEX\rgillespie	8/9/2013 12:14:31 PM	
Gilgamesh Cooking	DATEX\rgillespie	8/9/2013 12:23:39 PM	
	DATEX\rgillespie	8/9/2013 1:13:28 PM	
	DATEX\rgillespie	8/9/2013 1:25:41 PM	

Account Name: The Name of the Account associated with the Order.

Created By: The FootPrint User who created the Order.

Create On: The Date the Order was Created.

Warehouse: The Warehouse to which the Order belongs.

By double-clicking an Order, it will open the Order Details tab for the Order.

Order Details

The Order Details tab displays basic information about the Order, along with more specific details about each Order Line for the Order.

Basic Order Information

Order #: The Order Number for the Order.

Order Class: The Order Class the Order has been assigned to.

Status:	The current Status of the Order.
Owner:	The Name of the Owner for whom the Order was created.
Project:	The Name of the Project under which the Order was created.
Account:	The Name of the Account associated with the Order.
Owner Reference:	The Order's Reference Number.
Vendor Reference:	A Reference Number associated with the Vendor or Consignee Contact.
Notes:	Any notes in the system for the Order.

Order Line Details

Line #:	The Order Line Number for the Line.
Status:	The current Status of the Order Line.
Material:	The Material LookUp Code ordered for the Line.
Material Name:	The Name of the Material ordered for the Line.
Vendor Lot:	The Vendor Lot for the Materials on the Line.
Lot:	The Lot for the Materials on the Line.
Quantity:	The number of Packages of the Material ordered for the Line.
UOM:	The Packaging Type for the Material on the Line.
Base Available:	The total Quantity of the Material available in the Warehouse.
Pending Base:	The total Material Quantity attached to pending Orders (*not including* this current Order).
Remaining Base:	The final Material Quantity after factoring in the pending Orders (*including* this current Order).
Shipment #:	The number of the Shipment on which the Materials for the Line are to be delivered.
Notes:	Any notes in the system for the Order Line.
Marks:	Any marks in the system for the Order Line.

ePortal Shipments

Sections

- Overview
- Main Screen Layout
- Shipment Filter
- Shipment List
- Shipment Details

Overview

The ePortal Shipments tab displays a list of all Shipments in the system, which can be filtered by entering specific search terms. These Shipments can be opened for more detailed information.

Main Screen Layout

The Shipments tab is divided into two parts:

1. Shipments Filter

Allows the user to search for Shipments by the desired terms.

2. Shipments List

Displays information about all Shipments in the system matching the search terms.

Shipments Filter

Here the user can enter specific information by which the Shipments displayed in the Shipments List will be filtered, including drop-down lists for the **Owner** (the only information required to be entered), **Project**, and **Shipment Status**, the dates between which the Shipments were **Created** or **Shipped**, and open fields for the **Shipment Number**, the **Bill of Lading Number**, the **Seal ID**, and the **Tracking ID**. Once filter terms are entered, clicking the **Search** button will display all relevant Shipments in the Shipments List.

Shipments List

After searching for Shipments, all Shipments that match the filter terms will be displayed in the Shipments List, along with information about those Shipments.

Shipment Information

Type:	The Type of Shipment (Inbound or Outbound).
Shipment #:	The Shipment Number for the Shipment.
Tracking ID:	The Tracking ID for the Shipment's Load Container.
Load Container:	The LookUp Code for the Shipment's Load Container.
Status:	The current Status of the Shipment.
Shipped Date:	The date on which the Shipment was Shipped/Closed.
Carrier:	The Name of the Carrier for the Shipment.

Seal Id	Created Date	Priority	Bill Of Lading	Notes	Carrier Service
	7/25/2013 4:28	0	1000000000000		Ground
	7/25/2013 3:26	0	1000000000000		Air
	7/25/2013 3:36	0	1000000000000		
	7/25/2013 3:55	0	1000000000000		Air
	7/25/2013 4:19				
	7/25/2013 4:19		1000000000000		

Seal ID:	The Seal ID for the Shipment.
Create Date:	The Date on which the Shipment was Created.
Priority:	The Priority assigned to the Shipment.
Bill of Lading:	The Bill of Lading Number associated with the Shipment.
Notes:	Any notes in the system for the Shipment.
Carrier Service:	The Service Type by which the Shipment was made.

By double-clicking a Shipment, it will open the Shipment Details tab for the Shipment.

Shipment Details

Shipments	Shipment: 68	

Shipment #	**Shipped Date**	**Notes**
633	7/25/2013 3:21:36 PM	Shipment Closed by [Russell Gillespie], on [7/25/2013 3:21:36 PM]
Priority	**Available Date**	
2		
Bill of Lading	**Pickup Date**	
6541121		
Shipment Code	**Account**	
633		
Account Contact	**Seal Id**	
	11235	
Shipment Status		
Completed		

Shipment Lines | Orders | License Plates | Attachments

Line #	Status	Expected Quantity	Expected UOM	Actual Quantity	Actual UOM
1	Completed	50.00000000	Box	50.00000000	Box
2	Completed	300.00000000	Box	300.00000000	Box

The Shipment Details tab displays basic information about the Shipment, along with several tabs containing more specific details about the Shipment. These tabs are for each Shipment Line for the Shipment, for all Orders associated with the Shipment, for the License Plates associated with the Shipment, and any file Attachments for the Shipment.

Basic Shipment Information

Shipment #:	The Shipment Number for Shipment.
Priority:	The Priority assigned to the Shipment.
Bill of Lading:	The Bill of Lading Number associated with the Shipment.
Shipment Code:	The system-generated ID for Shipment.
Account Contact:	The Contact for the Account associated with the Shipment.
Shipment Status:	The current Status of the Shipment.
Shipped Date:	The date on which the Shipment was Shipped/Closed.
Available Date:	The date on which the Shipment is Available.
Pickup Date:	The date on which the Shipment to be picked up.
Account:	The Name of the Account (Sup-Supplier) associated with the Shipment.
Seal ID:	The Seal ID for the Shipment.
Notes:	Any notes in the system for the Shipment.

Shipment Lines Details

Line #	Status ▲	Material Lookup	Expected UOM	Expected Quantity	Actual Quantity	Actual UOM
1	Completed	Material 1	Case	1.00000000	0.0	Case

Line #:	The Shipment Line Number for the Line.
Status:	The current Status of the Shipment Line.
Material Lookup:	The LookUp Code of the Material on the Shipment Line.
Expected UOM:	The Packaging Type ordered for the Material on the Line.
Expected Quantity:	The number of Packages of the Material ordered for the Line.
Actual Quantity:	The actual number of Packages of the Material shipped for the Line.
Actual UOM:	The actual Packaging Type for the Material shipped.

Orders Details

Order #	Status	Order Class	Owner Name	Project Name	Account Name	Created By	Created On	Warehouse
813	Completed	Inbound ASN	Gilgamesh Cooking	Low Quality Goods	Grendel's Knives	DATEX\rgillespie	7/25/2013 2::	

Order #:	The Order Number for the Order.
Status:	The current Status of the Order.
Order Class:	The Order Class the Order has been assigned to.
Owner Name:	The Name of the Owner for whom the Order was created.
Project Name:	The Name of the Project under which the Order was created.
Account Name:	The Name of the Account associated with the Order.
Created By:	The FootPrint User who created the Order.
Create On:	The Date the Order was Created.
Warehouse:	The Warehouse to which the Order belongs.

License Plates Details

License Plate #	Base Quantity	Net	Gross	Weight UOM
LPSHP-001	500.00000000	10.00000000	10.00000000	Pound
LPSHP-002	50.00000000	50.00000000	60.00000000	Pound
LPSHP-003	750.00000000	10.00000000	10.00000000	Pound

License Plate #:	The License Plate LookUp Code.
Base Quantity:	The number of units of inventory on the License Plate.
Net:	The Net Weight of the License Plate.
Gross:	The Gross Weight of the License Plate.
Weight UOM:	The unit by which the Gross and Net Weights are measured.

Attachments Details

Double-Click To Download Attachment

Name	Size	Extension	Visibility	Download	Download Status
CLC logo.png	22 KB	.png	Public		Completed.

Name:	The name of the attached file.
Size:	The size of the attached file.
Extension:	The extension of the attached file.
Visibility:	The privacy level of the file.
Download:	A download status bar indicating how much of the file has

been downloaded when double-clicked.

Download Status: The status of the download when downloading an attachment.

ePortal Inventory

Sections

- Overview
- Inventory List

Overview

The ePortal Inventory tab displays a list of all Inventory in the system, filtered by Project.

Inventory List

Once an **Owner** and **Project** are selected from the drop-down lists, all Materials categorized under the chosen Project will be displayed. These Materials are organized by Lot.

Material:	The Material LookUp Code for the Materials.
Lot:	The Lot for the Materials.
Available:	The number of Packages of the Material that are still Available for Shipment.
On Hand:	The total number of Packages of the Material in the Warehouse.
Packaging:	The Packaging Type for the Materials.

Description: A description of the Materials.

Warehouse: The Warehouse in which the Materials are located.

Vendor Lot: The Vendor Lot for the Materials.

ePortal Reports

Overview

Reports are designed to deliver precise and current information about your Warehouse, and be customized to fit your or your customer's needs.

Main Screen Layout

The ePortal screen is divided into two parts that concern Reports:

1. Reports List

Clicking the Reports tab on the left side of the screen opens a list of all Reports available to the user. To load the most currently available Reports, click the **Refresh** button.

> ⚠ **Note**
>
> Users only have access to Custom Reports for which they have viewing privileges.

2. Report Details

Once a Report from the list is clicked, it will open the in a new tab. Depending on the Report, you may have to enter filter terms to display information.